



**J. Robert Wheat, CPA, J.D.,
AEP®**

Senior Tax Manager

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Bachelor of Business
Administration
University of Tennessee
(Chattanooga)

Juris Doctor
University of Tennessee (Knoxville)

Member: AICPA, TSCPA,
Chattanooga Tax Practitioners,
Estate Planning Council of
Chattanooga, Trusts and Estates
Section of the Chattanooga Bar
Association

*Licensed to practice accounting in
Tennessee*

*Licensed to practice law in
Tennessee, the United States
district courts and the United States
Tax Court*

Accredited Estate Planner®

Bob is a Senior Tax Manager specializing in tax and estate planning, for closely held businesses, tax exempt organizations and high income individuals, as well as high level IRS controversy resolution. He has more than 20 years experience in the tax controversy area and has represented businesses, tax exempt organizations and individual clients in numerous IRS examinations and appeals while at Decosimo. Prior to joining Decosimo, Bob spent five years in practice with a Big Four accounting firm, where he gained broad experience in tax accounting for public and private companies. This experience included tax planning for both domestic and international operations, as well as performing special tax research and planning projects for that firm's national industry specialist for tax exempt organizations. Additionally, Bob has spearheaded FIN 48 compliance projects for public and private companies, including companies with foreign ownership and international affiliates.

In the tax exempt organizations area, Bob has performed tax planning and compliance work for numerous non-profit organizations. His work has included planning projects to establish for-profit subsidiaries to participate in private-public partnerships, planning to minimize adverse consequences of the Unrelated Business Income Tax, and establishing fringe benefit and executive deferred compensation programs. He has successfully handled IRS examinations for some of these same clients. Representative clients include the Siskin Children's Institute, the Public Education Foundation, and The RiverCity Company, which has coordinated the public and private efforts to develop downtown Chattanooga since 1986.

Bob is certified as an Accredited Estate Planner® by the National Association of Estate Planners and Councils. In addition to being a CPA, Bob is a licensed attorney and he has handled tax controversies in both federal district court and the U.S. Tax Court. He earned a Bachelor's degree in Business Administration from the University of Tennessee at Chattanooga, and he earned his Juris Doctor from the University of Tennessee, College of Law in Knoxville.